



Advanced Sample Orders Magento 2 Extension



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Introduction to Advanced Sample Orders

In B2B or B2C ecommerce platforms, customer prefers to try a sample product before placing bulk order. In general both sample and regular orders are processed in same way. This requires admin to manually make changes for sample product buyers. It's a tedious and time consuming method. Advanced Sample Orders Extension help customers to order samples prior to bulk purchase. Here, the sample order is processed as regular order but seller can customize, like lowering the price, restricting number of samples and more. Advanced Sample Order also provides analytical information which will be helpful in getting business insights from people who place's bulk order.

Features

- Administrator can restrict ordering samples to a specific product / customer group.
- Allow us to configure the prices for a sample both products level and in general level.
- Available for Single, Configurable, Grouped and Bundle Products.
- Store owners can set different types of price structure for samples. It can be fixed price or percentage of regular price. For e.g., 200% of original price. Fixed price option will not be applicable to configurable, grouped & downloadable product since the prices are dynamic as per user selections.
- Allow us to process both samples and normal products in a single order.
- Allow us to provide free samples too.
- It is easy to identify the sample products in any order both in frontend and back-end.



Version & Compatibility Support

Version: 1.0.0 Stable

Compatibility: This extension is compatible for Magento Community 2.x and Magento Enterprise 2.x versions.

How to install this module?

Step 1: Download/purchase the extension.

Step 2: Create a directory `app\code\DCKAP\AdvancedSampleOrders` in your Magento Installation directory.

Step 3: Unzip the file in the above directory.

Step 4: Enter the following at the command line:

```
php bin/magento module:enable DCKAP_AdvancedSampleOrders
```

Step 5: Enter the following at the command line:

```
php bin/magento setup:upgrade
```

Step 6: Login to Magento backend and navigate to **Sales** -> **Advanced Sample Orders** -> **Configuration** and configure the module.

Step 7: Clear the cache using the following command:

```
php bin/magento cache:clean
```

General Configuration

General Configuration



Enabled
[store view] Yes

Allow / Restrict Samples by Products-wise
[store view] Yes
If YES, Admin can able to allow / restrict the Sample for each Product.

Allow Only LoggedIn Customers
[store view] Yes
If Yes, only logged-in customers can able to order samples.

Customer Group
[store view] General
Wholesale
Retailer
Selected customer group members can only able to order samples.

- Select **Enabled** to Yes for enabling the module.
- Select **Allow/Restrict sample order option by product-wise** to Yes for restricting the samples by product-wise.
- Select **Allow only logged-in customers to order samples** to Yes for restricting guest users to order samples.
- If above one is selected to Yes, Select the **customer groups** to restrict sample option only to specific groups.

Price Configuration

Price Configuration



Price Type
[store view] Fixed

Fixed will not be applicable for configurable, bundle and grouped product. If Fixed is selected, by default, percent will be considered.

Amount
[store view] 10

If price type is percent, then the price will be n% of original price where n is above defined value

- Select **Price Type** to Fixed (for fixes price) or Percent (for percentage of regular price).
- Provide a numerical value (fixed price or percentage depends on above option) to **Amount** field.

Sales Analytics Configuration

Sales Analytics



Status
[store view]

Ordered
Shipped
Invoiced
Backordered
Returned
Refunded
Canceled

Above status is used to track the order conversion. For eg, Assume Invoiced is selected, and if a new order is placed, our algorithm tracks the last ordered sample with status Invoiced. Default value is Invoiced.

Days
[store view] 30

Tracks the samples only ordered before given 'n' days. Default is 30.

- Select **Order Item Status** to indicate the order item is completed. It is used for tracking order conversion. For e.g., Assume Invoiced is selected and if a new order get placed, our algorithm tracks the last ordered sample with status Invoiced.
- Provide a numerical value for **Days** field.

Sample Product Information

Allow Sample [global] Yes

Apply Product Price [global] ▼
If Use Base Config is selected, below prices will not be considered (General price configuration will be taken)

Price Type [global] ▼
Fixed will not be available for configurable, bundle and grouped products.

Amount [global]
If price type is percent, then the price will be n% of original price where n is above defined value

If **Allow/Restrict sample order option by product-wise** to Yes in general configuration, this information will be considered.

Select Apply Product Price to any of below options

- **Use config** - general price configurations will be considered irrespective of this product specific configuration.
- **Use actual price** - original price of the product is considered.
- **Use below price** - below price configurations will be considered irrespective of these general configurations.

Once all the configurations are done, Order Sample option will be available in front-end.

Product Detail Page



Strive Shoulder Pack

★★★★★ 2 Reviews [Add Your Review](#)

\$32.00

IN STOCK
SKU#: 24-MB04



Qty

1

Order Samples



Add to Cart

Add Sample to Cart
(for \$10.00)


♥ ADD TO WISH LIST 📊 ADD TO COMPARE ✉ EMAIL


This is how product detail page will look in real time once the Advanced Sample Order module is enabled. By default quantity will be set to 1 when customer/guest try to add sample (even they set quantity more).

Advanced Sample Order module does not allow customer/guest to add more than one sample of same product.

Shopping Cart

Shopping Cart

Item	Price	Qty	Subtotal
 Strive Shoulder Pack (SAMPLE) <i>Sample Product</i>	\$10.00	1	\$10.00

Gift options ▾ 

Update Shopping Cart

Apply Discount Code ▾

Summary

Estimate Shipping and Tax ▾

Subtotal \$10.00

Tax \$0.00

Order Total \$10.00

[Proceed to Checkout](#)

[Check Out with Multiple Addresses](#)

Sample Products are highlighted with keyword (SAMPLE) to differentiate from normal products. Customer/Guest cannot edit the sample.

Also the quantity is fixed to 1. Customer/Guest are not allowed changing the quantity of sample.

Customer Account – Recent Orders & My Orders

My Orders

Order #	Date	Ship To	Order Total	Sample	Status	
000000044	9/21/16	Veronica Costello	\$39.64	No	Pending	View Order Reorder
000000043	9/21/16	Veronica Costello	\$15.83	Yes	Pending	View Order
000000042	9/20/16	Veronica Costello	\$69.28	No	Processing	View Order Reorder
000000041	9/20/16	Veronica Costello	\$59.54	Yes	Processing	View Order
000000040	9/8/16	Veronica Costello	\$63.87	Yes	Pending	View Order

Indicates whether order has sample products or not

Items 1 to 5 of 38 total

1 2 3 4 >

Allows customer to easily identify any order has sample products or not in Dashboard and My Orders pages itself.

Customer Account – Order Detail Page

Order # 000000043 PENDING

September 21, 2016

[Reorder](#)

[Print Order](#)

Items Ordered				
Product Name	SKU	Price	Qty	Subtotal
Strive Shoulder Pack (SAMPLE)	24-MB04	\$10.00	Ordered: 1	\$10.00
			Subtotal	\$10.00
			Shipping & Handling	\$5.00
			Tax	\$0.83
			Grand Total	\$15.83

Sample Product (with red arrow pointing to 'SAMPLE' in the product name)

As similar to shopping cart, a customer can easily differentiate sample products and normal products in order/invoice/shipment/credit-memo detail pages.

Backend - Orders

Search by keyword

Actions 42 records found per page of 3

ID	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Status	Grand Total (Purchased)	<input type="checkbox"/>	Action	Sample
000000044	Main Website Main Website Store Default Store View	Sep 21, 2016, 4:09:00 AM	Veronica Costello	Veronica Costello	\$39.64	Pending	\$39.64	<input type="checkbox"/>	View	No
000000043	Main Website Main Website Store Default Store View	Sep 21, 2016, 4:09:00 AM	Veronica Costello	Veronica Costello	\$15.83	Pending	\$15.83	<input type="checkbox"/>	View	Yes

Store Owners can segment orders based on order which has sample products or not. So that, it will be easy for store owners to manage the orders.

Backend – Order Detail Page

✓ This Order contains Sample Product(s).

Customer History (All Products)



ORDERED	2
SHIPPED	1
INVOICED	2
BACKORDERED	0
RETURNED	0
REFUNDED	0
CANCELED	0

Customer History (Specific to this Order - last 10 items)

ORDER	PRODUCT NAME	ORDERED ON	STATUS
#000000041	Strive Shoulder Pack	Sep 20, 2016	Invoiced

** Provides information about previous sample orders*

** Decision making on customer trustability*

** Helpful for processing the order*

Items Ordered

Product	Item Status	Original Price	Price	Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	Row Total
Strive Shoulder Pack (SAMPLE)	Ordered	\$32.00	\$10.00	Ordered 1	\$10.00	\$0.83	8.25%	\$0.00	\$10.83
SKU: 24-MB04									

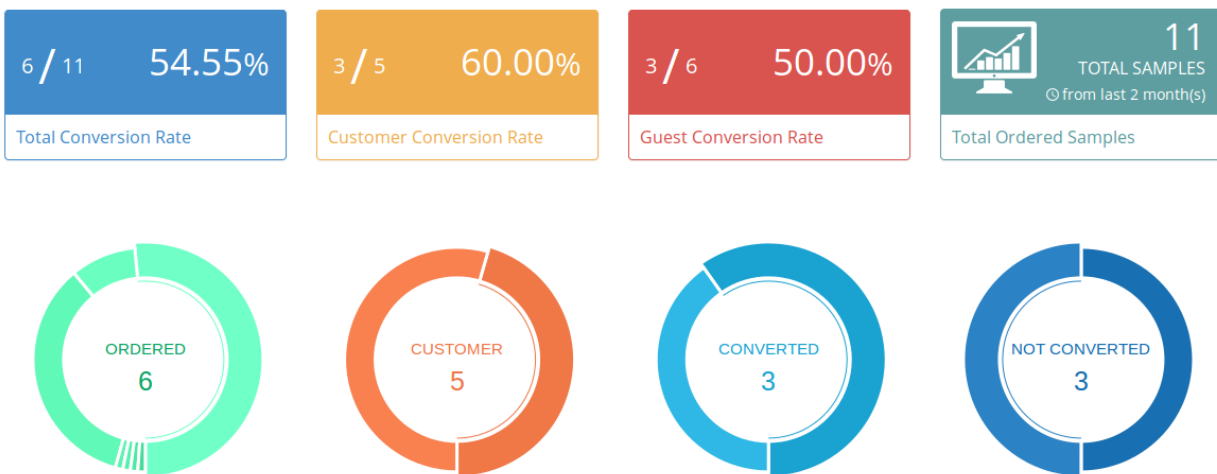
In Order page, Store Owner can find a new section containing historical information of the customer and other details related to the order which has sample products. It will be helpful in decision making on processing the sample product.

- It contains the status of all the samples ordered by the customer/guest.
- Also it contains the previous sample products status information related to the ordered sample products.

Sales Analytics - Dashboard

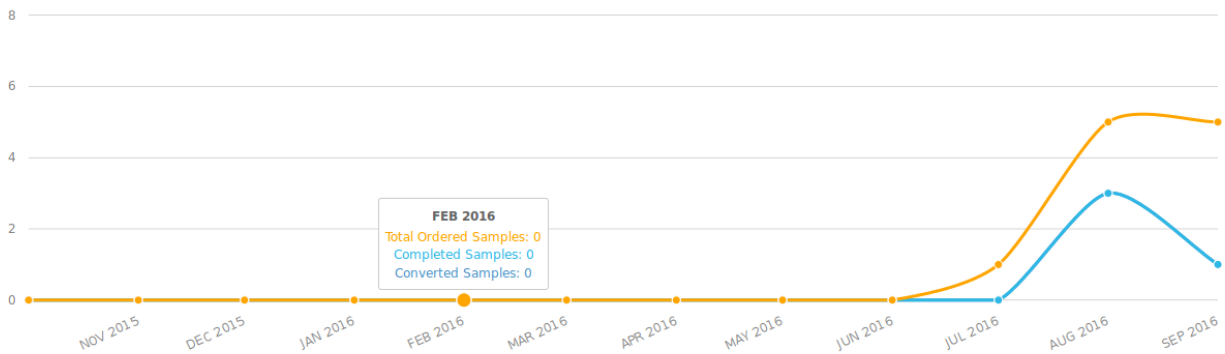
Advanced Sample Orders module provides detailed analysis on samples. It is useful for keep tracking of business. It is more useful for store owners to identify following things.

- Conversion Rates(All, Customers & Guests)
- Total number of samples ordered & samples converted & samples completed.
- Segmenting all the samples based on status.
- Segmenting Customer Samples and Guest Samples.



Also it provides last 12 months graphical representational of data based on samples ordered, completed & converted samples.

Total Ordered Samples vs Completed Samples vs Converted Samples



Store Owners can view how many samples are ordered and how many are converted.

Key Notes

- Product specific configurations will be available only if **Allow/Restrict sample order option by product-wise** option is selected to Yes in general price configurations.
- Fixed prices option will not be applicable to **configurable, grouped & downloadable** product since the prices are dynamic as per user selections. However, percentage of final price of respective product will be applicable.
- If the product type of general price configuration is selected to Fixed, it will be ignored and by default, **percent will be considered** for configurable, grouped and bundle products.
- For complex product types (such as configurable, grouped & bundle) and if product specific price configuration is enabled, then the parent product specific configurations will be considered irrespective of its child products.
- Error message will be displayed, when user tries to add samples of same product more than once into shopping cart. This helps in preventing users to add same product samples multiple times.
- Error message will be displayed, when user tries to add a sample only if the shopping cart already contains the same normal product with same options.
- Error message will be displayed, when user tries to add a normal product only if the shopping cart already contains the same sample product with same options.



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